



Colorado ABLE Investment Option Change/Future Contribution Allocation Form

- Use this form to request your twice per calendar year Investment Option change or to change your future contribution allocations.
- Complete **Section 2** to change your current Investment Options to new Investment Options. (*You can do this only twice per calendar year.*)
- Complete **Section 3** to change your allocation instructions for future contributions.
- Type or print clearly, printing in capital letters and black ink. Please mail the form to the Plan. Do not staple..

Forms can be downloaded from our website at **coloradoable.org**, or you can call us to order any form — or request assistance in completing this form — at **1.888.609.3468** any business day from 8 a.m. to 5 p.m. MT.

1.888.609.3468
8 a.m. to 5 p.m. MT M-F

coloradoable.org

clientservice@coableonline.com

Regular mailing address:

Colorado ABLE
P.O. Box 219431
Kansas City, MO 64121

Overnight mailing address:

Colorado ABLE
1001 E 101st Terrace, Suite 200
Kansas City, MO 64131

1. Account Owner information

—

Account Number

Name of Account Owner (*first, middle initial, last*)

— —

Telephone Number



* COLORADO ABLE INVEST OPTION CHANGE *

2. Investment Option Change

- For each Investment Option you wish to change, indicate the percentage of assets you want moved and where you want the assets invested.
- See the Colorado ABLE Plan Disclosure Booklet, available at coloradoable.org, for complete information on Investment Options.
- Your total Investment Option percentages must equal **100%**.

Remember: Federal law allows Account Owners to make two Investment Option changes each calendar year.

Note: This change applies only to the assets currently held in your Account; it will not affect the allocation of your future investments.

Exchange FROM		Investment Option	Exchange TO
All	Percentage		
<input type="checkbox"/>	OR	<input type="checkbox"/> <input type="checkbox"/> %	Aggressive <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> %
<input type="checkbox"/>	OR	<input type="checkbox"/> <input type="checkbox"/> %	Moderately Aggressive <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> %
<input type="checkbox"/>	OR	<input type="checkbox"/> <input type="checkbox"/> %	Growth <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> %
<input type="checkbox"/>	OR	<input type="checkbox"/> <input type="checkbox"/> %	Moderate <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> %
<input type="checkbox"/>	OR	<input type="checkbox"/> <input type="checkbox"/> %	Moderately Conservative <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> %
<input type="checkbox"/>	OR	<input type="checkbox"/> <input type="checkbox"/> %	Conservative <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> %
<input type="checkbox"/>	OR	<input type="checkbox"/> <input type="checkbox"/> %	Checking Account Option <i>(May not be available for accounts with Co-Authorized Individuals)</i> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> %
			1 0 0 %

3. Allocation instructions for future contributions

- Whether or not you made an investment change in **Section 2**, if you want to change how future contributions are allocated to your Investment Options, indicate the new allocations below.
- If you have added additional Investment Options in **Section 2**, please be sure that the allocations below reflect the correct Investment Options for your future contributions.
- Your future contributions will not affect assets currently held in your Account.
- Your total Investment Option percentages must equal **100%**.

Aggressive	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> %
Moderately Aggressive	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> %
Growth	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> %
Moderate	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> %
Moderately Conservative	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> %
Conservative	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> %
Checking Account Option <i>(May not be available for accounts with Co-Authorized Individuals)</i>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> %
1 0 0 %	

4. Checking Account Option Information *(only to be completed if you select the Checking Account Option in Section 2 or 3 and you do not currently or have not previously invested in the Checking Account Option.)*

***Important Information about the Checking Account Option:**

- You will receive a free debit card within 10 days after the Checking Account Option is funded and you have the option to order checks for a nominal fee.
- Account Owner information must be completed in **Section 4A**.
- If the Account Owner is a minor or if there is an Authorized Individual on the Account, please also complete.

(optional) Please send me a check book that contains 40 checks. A fee of \$6.00 will be assessed to the Checking Account Option. The check book will be shipped when the balance of the Checking Option is at least \$25.00.

5. Signature — YOU MUST SIGN BELOW

- I certify that I have read, understand, consent, and agree to all the terms and conditions of the Colorado ABLE Plan Disclosure Booklet and understand the rules and regulations of Colorado ABLE as they relate to this Investment Option Change/Future Contribution Allocation request.
- By signing below, I authorize the Program Manager or its designees to change my Investment Options and/or my allocations for future contributions according to the instructions above.
- If I am selecting the Checking Account Option, I hereby acknowledge that I have received, read, and that by signing this form, agree to the Checking Account Option Terms and Conditions.
- If I am an Authorized Individual, I certify that I am authorized to act on the Account Owner's behalf in making this request and that the request is in the best interest of the Account Owner.

SIGNATURE

Signature of Account Owner or Authorized Individual

— —

Date (mm/dd/yyyy)

SIGNATURE

Signature of Additional Authorized Individual *(Only if applicable)*

— —

Date (mm/dd/yyyy)

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